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Electronic Subcontracting Reporting System (ESRS)

Point of Contact Official Guide 1.2

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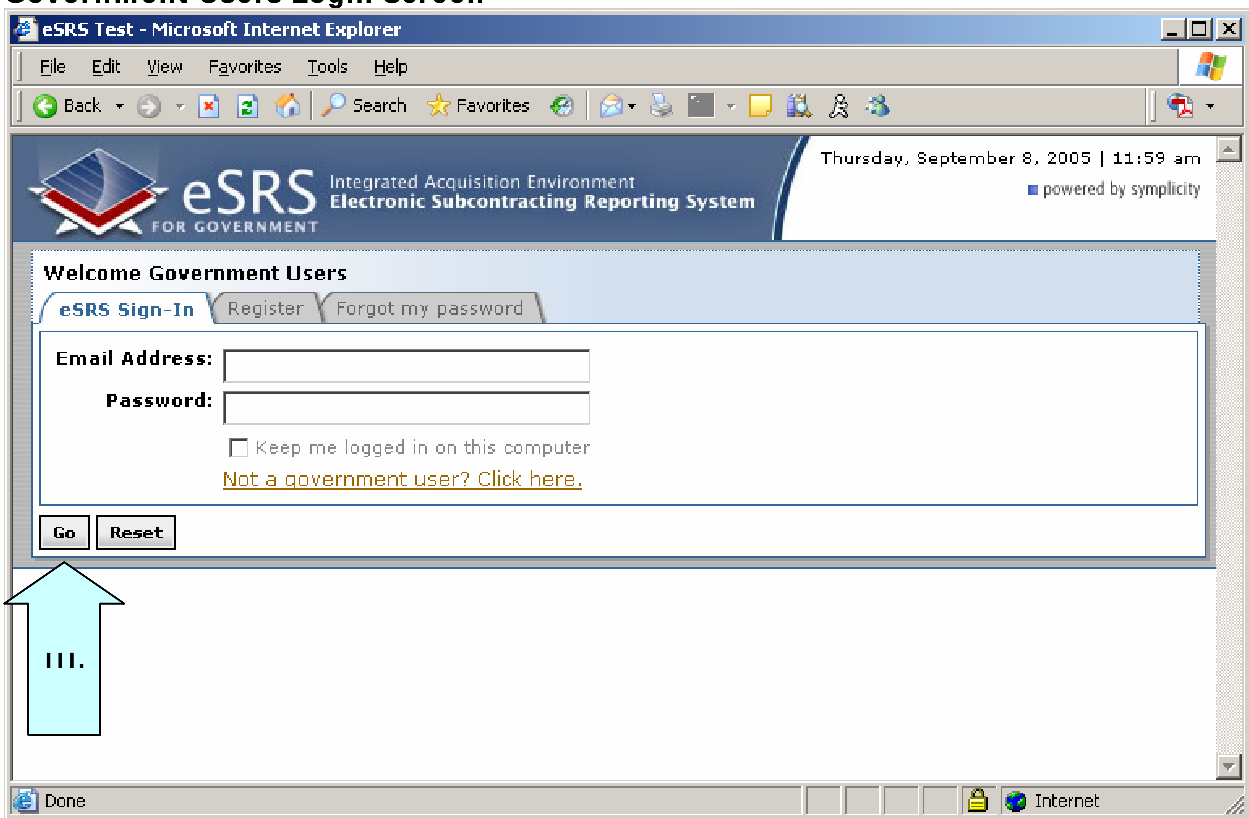
1. Log-In to ESRS

1.1 Existing Users

I. Point your browser to https://www.esrs.gov/government/
II. Login to ESRS by typing your e-mail address and password.
III. Click “Go”

Government Users Login Screen



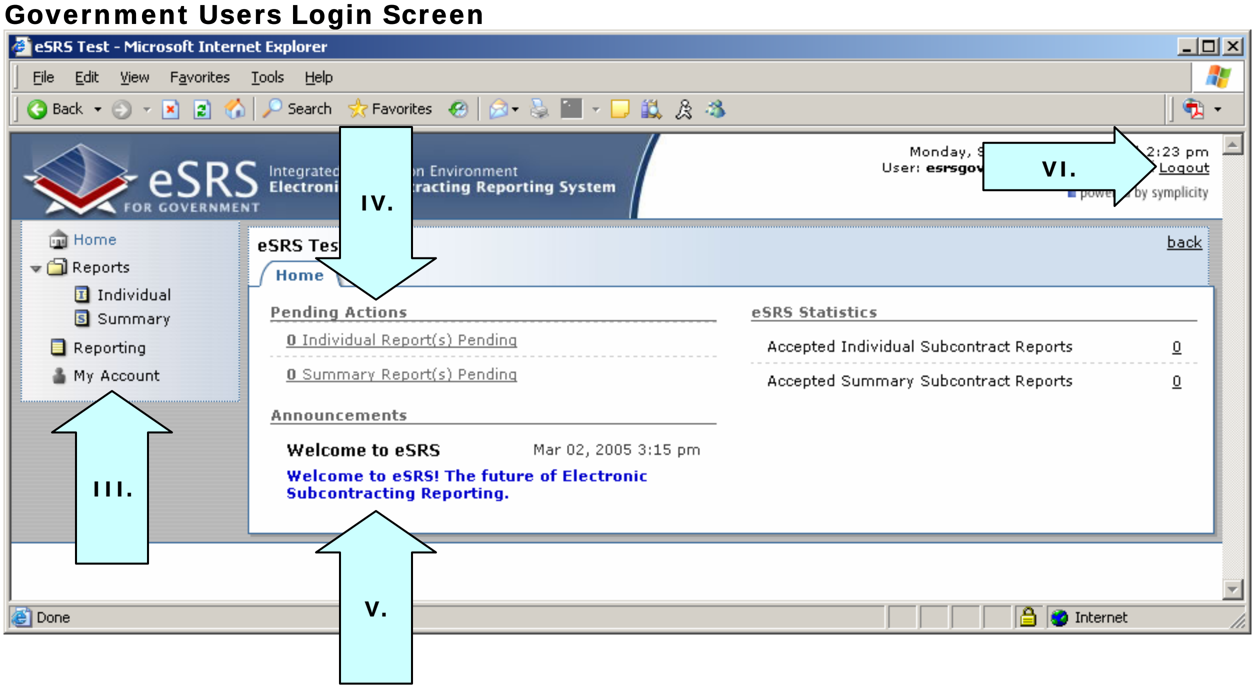
1.2 New Users

I. Point your browser to https://www.esrs.gov/government/
II. Click on the “Register” tab.
III. Select your Agency.
IV. Complete the forms, clicking continue after you have completed each section.
V. At the last step, please review the information, and when ready click “Submit Registration”
VI. You will receive an e-mail after submitting. Please follow the directions in the e-mail that you receive.
VII. After confirming your account, you will see an “Account Confirmation Successful” message. You must now wait for approval.
VIII. Once you are approved, you will be sent another e-mail.
IX. You may now login to the system by following “Section 1.1, p. 3” of this manual.

2. Home

I. Login to ESRS.
II. You will be directed to your ESRS homepage. (Depending upon your account, your homepage and navigation menu may appear differently)
III. On the left hand side of the screen, the navigation menu is shown. This menu is available throughout all pages on the system.
IV. "Pending Actions" will display all items in the system that your account has access to with the status "pending".
V. Announcements are created by administrators. For more information on how to create announcements, please review "Section 3" of this manual.
VI. Finally, when you are done using the system, please click on the "Logout" link on the top of every page.

Government Users Login Screen

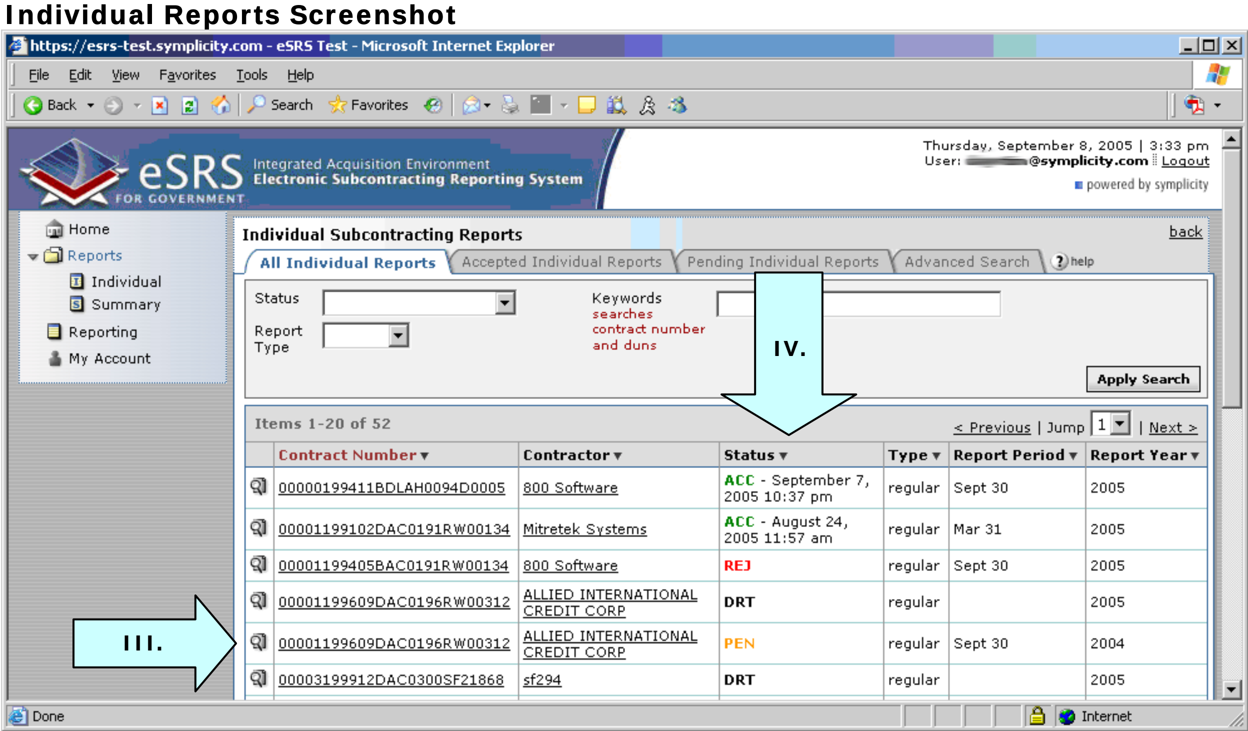


3. Reports

3.1 Individual

I. Click on “Reports” and then “Individual” on the left hand navigation menu.
II. You will see a screen similar to the Individual Reports Screenshot below.
III. Click on the View Icon beside any report to see more information regarding the filed report.
IV. You may sort the list of reports based on column. This is accomplished by clicking on the text next to any down arrow (▾) in the column headings. You may sort the list in ascending order if you click on the same heading again. Note how the color of the text changes. The current active column is designated by a Maroon color.
V. You may also view only specific types of reports using the search fields above the list or by clicking on the tabs near the top of the screen.
VI. Notice, this screen will only show twenty reports at a time. To view more, simply click on the “Next >” or “< Previous” links to traverse through the list.

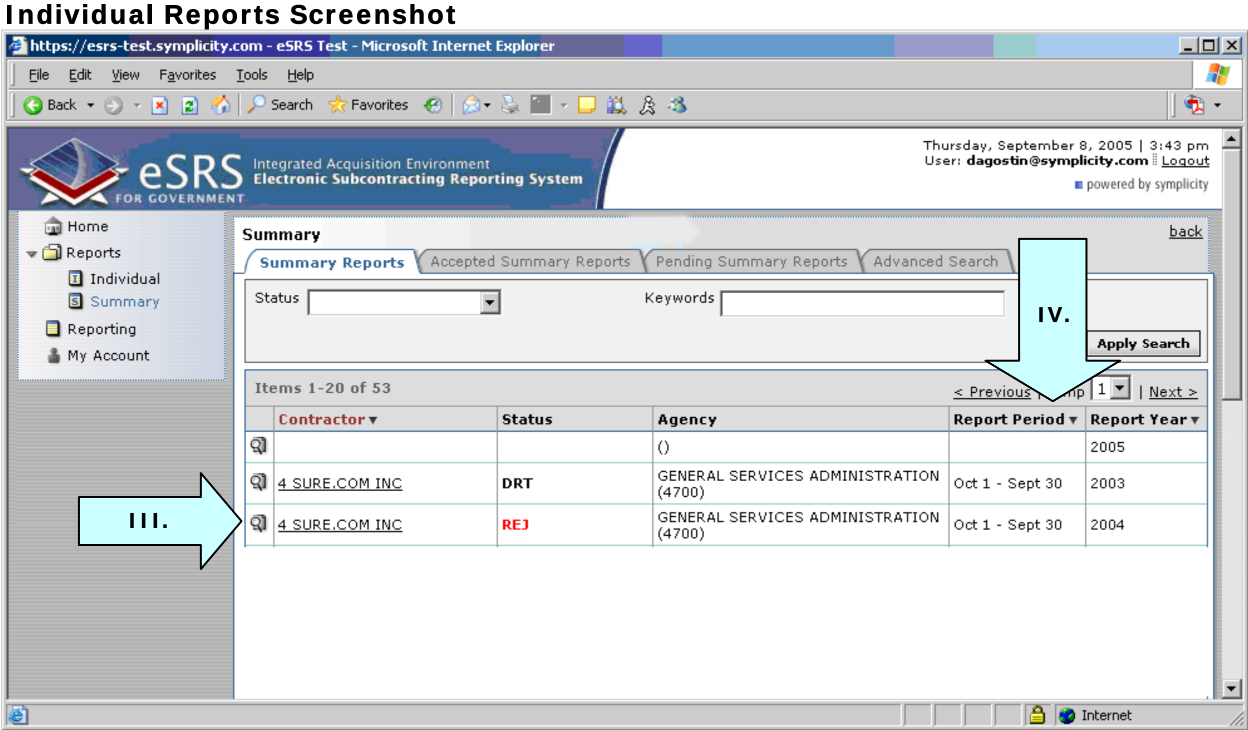
Individual Reports Screenshot



3.2 Summary

I. Click on “Reports” and then “Summary” on the left hand navigation menu.
II. You will see a screen similar to the Summary Reports Screenshot below.
III. Click on the View Icon beside any report to see more information regarding the filed report.
IV. You may sort the list of reports based on column. This is accomplished by clicking on the text next to any down arrow (▾) in the column headings. You may sort the list in ascending order if you click on the same heading again. Note how the color of the text changes. The current active column is designated by a Maroon color.
V. You may also view only specific types of reports using the search fields above the list or by clicking on the tabs near the top of the screen.
VI. Notice, this screen will only show twenty reports at a time. To view more, simply click on the “Next >” or “< Previous” links to traverse through the list.

Individual Reports Screenshot

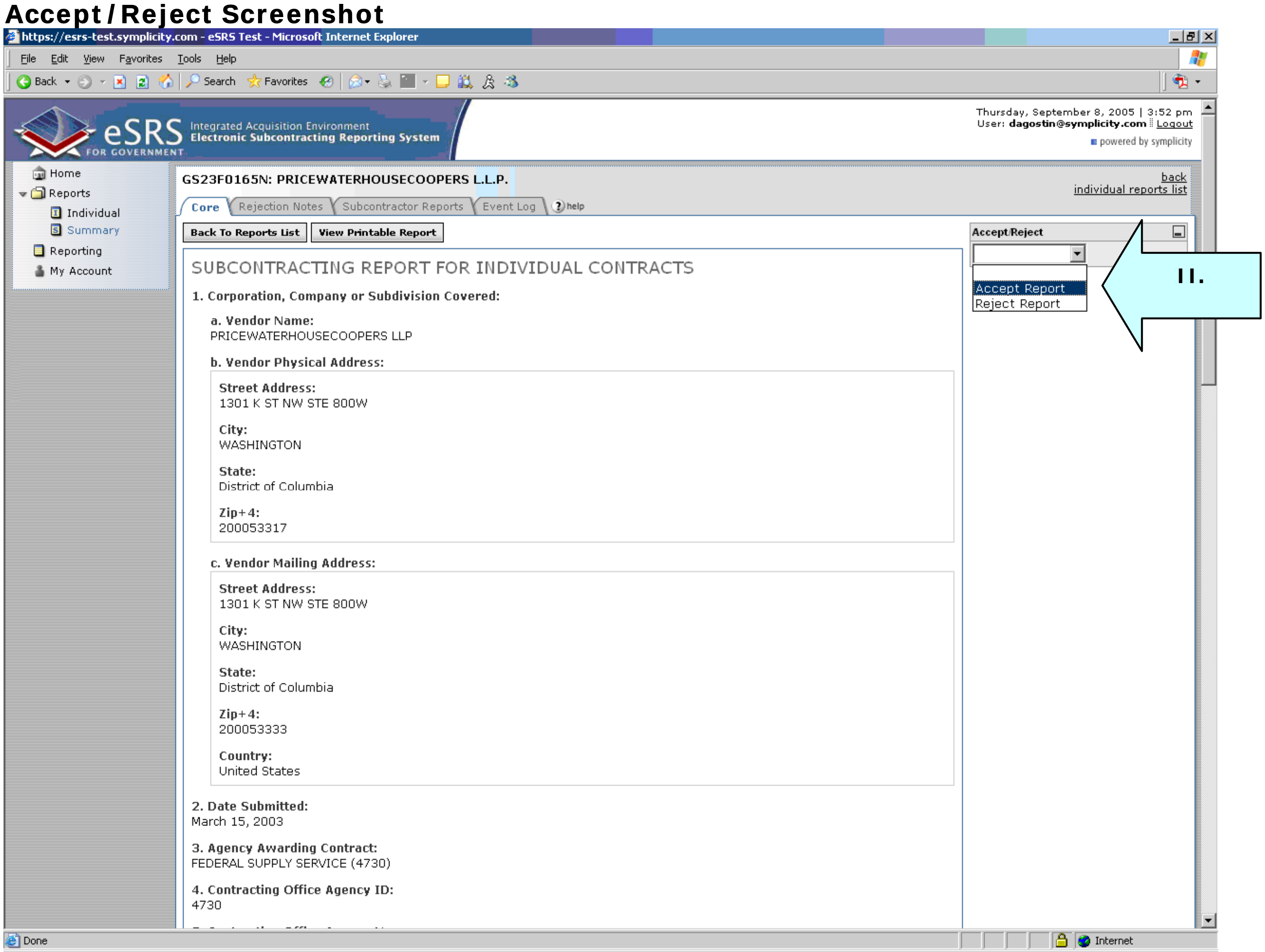


3.3 Accept / Reject

The processes to accept or reject individual and summary reports are the same. To accept or reject, simply go to the section (Individual or Summary) that the report is filed. Click on the "Pending" tab near the top of the screen, and find the report that you would like to accept or reject.

I. Click on the View Icon beside the report.
II. Select Accept Report or Reject Report from the drop down box (See Accept/Reject Screenshot below).
III. If you accepted the report, you may return to the report list by clicking on the "Back to Reports List" button.
IV. If you clicked "Reject Report" you will be redirected to a page with a form. Please fill this form out with information why the report was rejected. After completing the form, click "Submit" to finalize the rejection.

Accept / Reject Screenshot

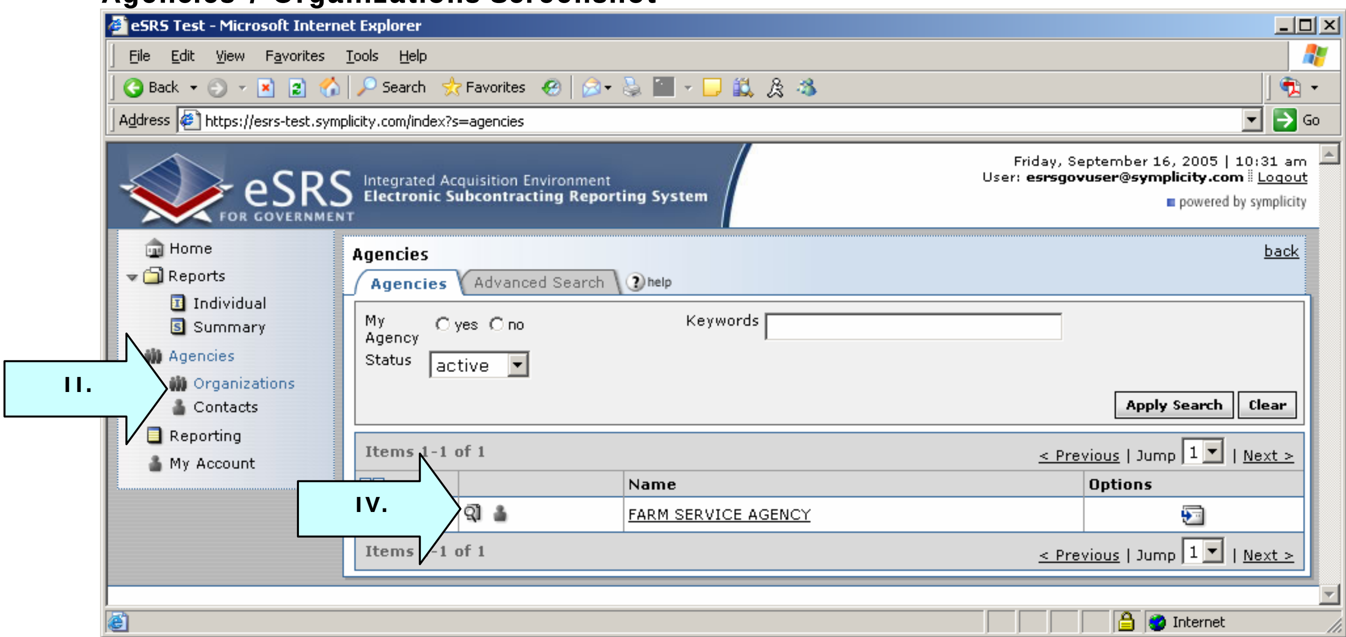


4. Agencies (Organizations)

4.1 Review / View Existing

I. Click on "Agencies" on the left hand navigation menu.
II. Click on "Organizations" on the left hand menu.
III. You will see a screen similar to the "Agencies / Organizations Screenshot" below.
IV. Click on the View Icon beside any contractor to see more information pertaining to that specific contractor.
V. Notice that any child organization will appear below the parent organization and will also have a ↳ to the left of the name.

Agencies / Organizations Screenshot



4.2 Contacts

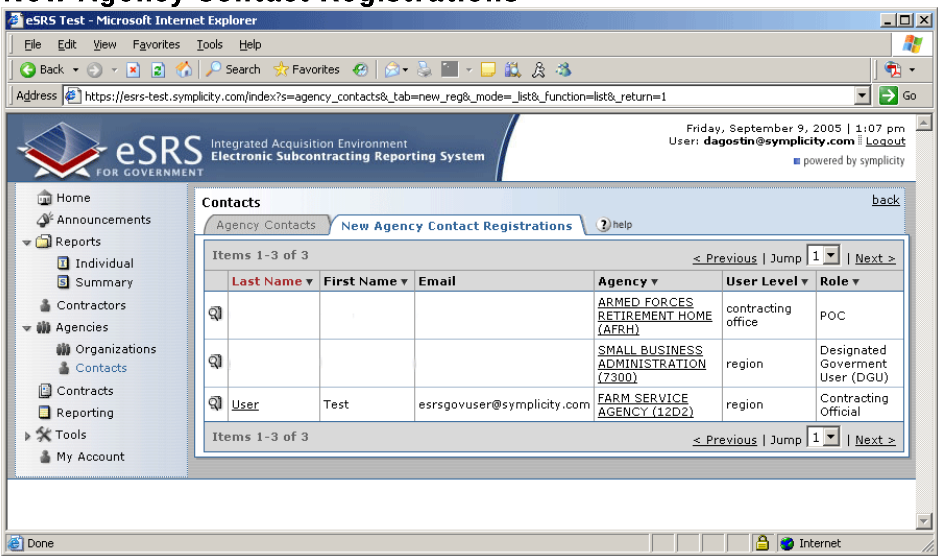
I. Click on “Agencies” on the left hand navigation menu.
II. Click on “Organizations” under Agencies.
III. Click on the Contacts button next to the agency.
IV. The Contacts for this agency will appear.
V. You can set a contact as the primary contact by clicking on the “Set Primary” button.
VI. You may also edit a contact by clicking on the Edit Icon beside the contact you wish to edit.
VII. Finally, to send an e-mail to the contacts, put a checkmark beside the contacts you wish to e-mail. Use the “Batch Options” drop down to send an e-mail.
VIII. For more information, please read Section 7, Contacts.

4.3 Approve / Reject Agency Contact Registration

Agency Contact registrations must first be approved before the user can begin using the ESRS system.

I. On the “Home” page, New Contact Registrations will appear under “Pending Actions” if contacts need approved.
II. Click on the “New Agency Contact Registrations” link.
III. You may also click on Agencies and then Contacts on the left hand navigation menu. After clicking on Contacts, Click on the “New Agency Contact Registrations” tab to go to the same place that the Home Page link directs you.
IV. Click on the View Icon beside the contact you wish to approve or reject.
V. Click on **Approve Registration** or **Reject** to complete the process.

New Agency Contact Registrations

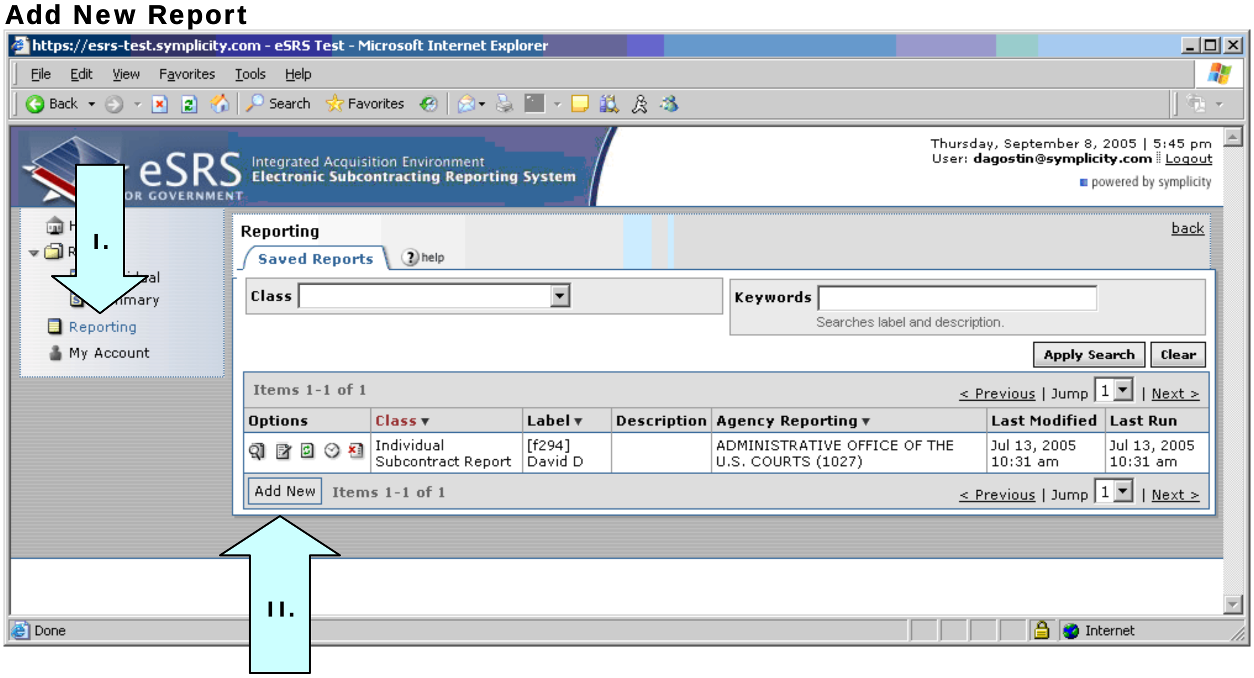


5. Reporting

5.1 Build New Reports

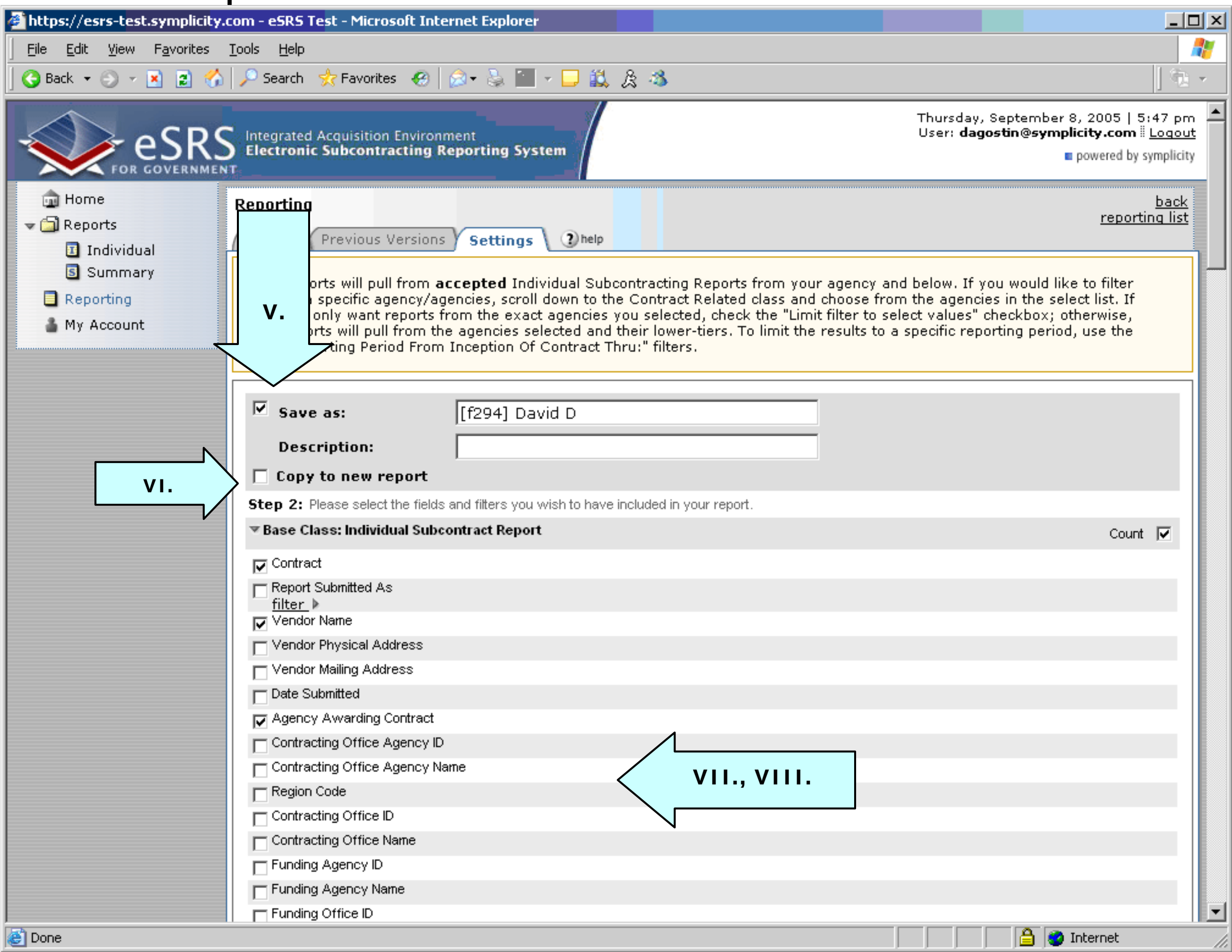
I. Create New Report by clicking on REPORTING on the left navigation menu.
II. Click on Add New

Add New Report



III. Select the basis for your report.
IV. Click Continue
V. Before building the report, checkmark the Save As box and input a Name and Description for the Report.
VI. When updating an existing report, save the report under a different name by check-marking Copy to New Report.
VII. Select the fields to be included in the report by check-marking specific fields.
VIII. Narrow the focus of the report by clicking on a Filter link under a particular field.
IX. Once fields and filters have been assigned, view the report by clicking Submit at the bottom of the page. ***NOTE:*** Save & return will save change to report builder, but will not run report in order to view it.

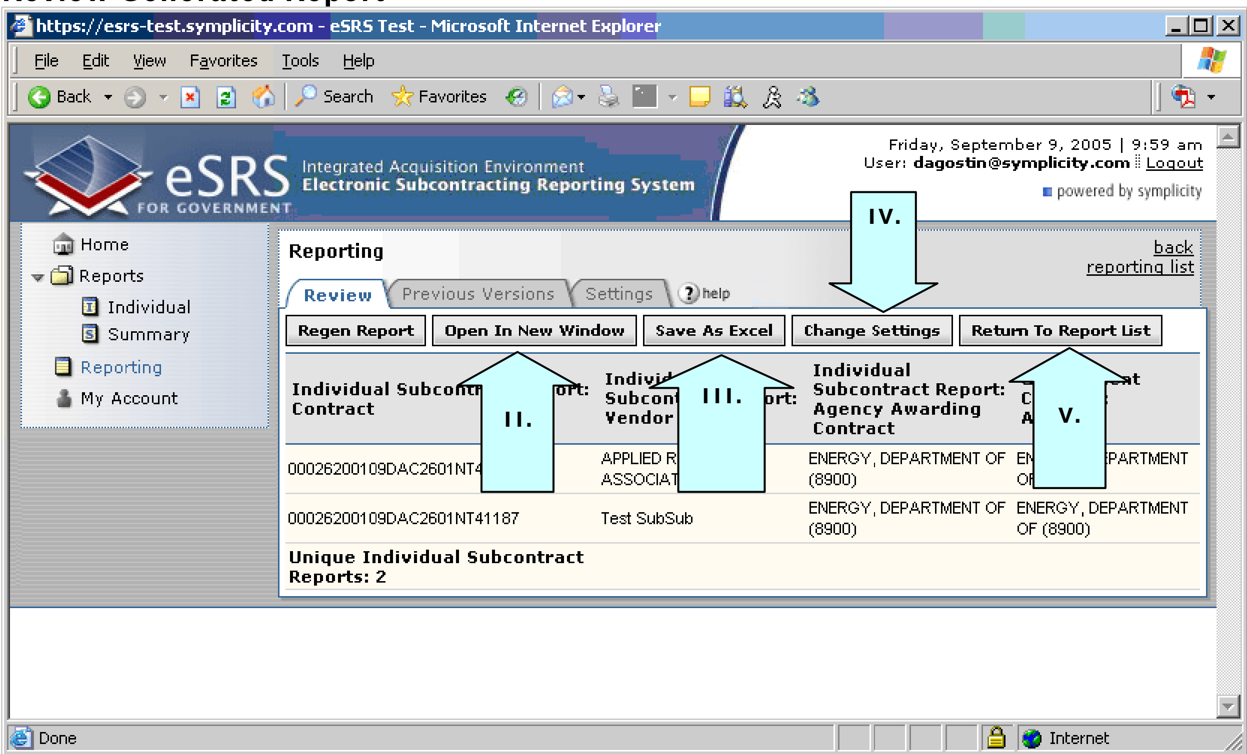
Build a New Report



5.2 View Generated Report

I. Click on the View Icon beside an existing report.
II. Show the report in a separate browser by clicking on the Open in New Window button at the top.
III. Transfer the report into an Excel Workbook by clicking the Save as Excel button.
IV. Re-configure the report by clicking on Change Settings button at the top.
V. Go back to the report list by clicking the Return to Report List button.

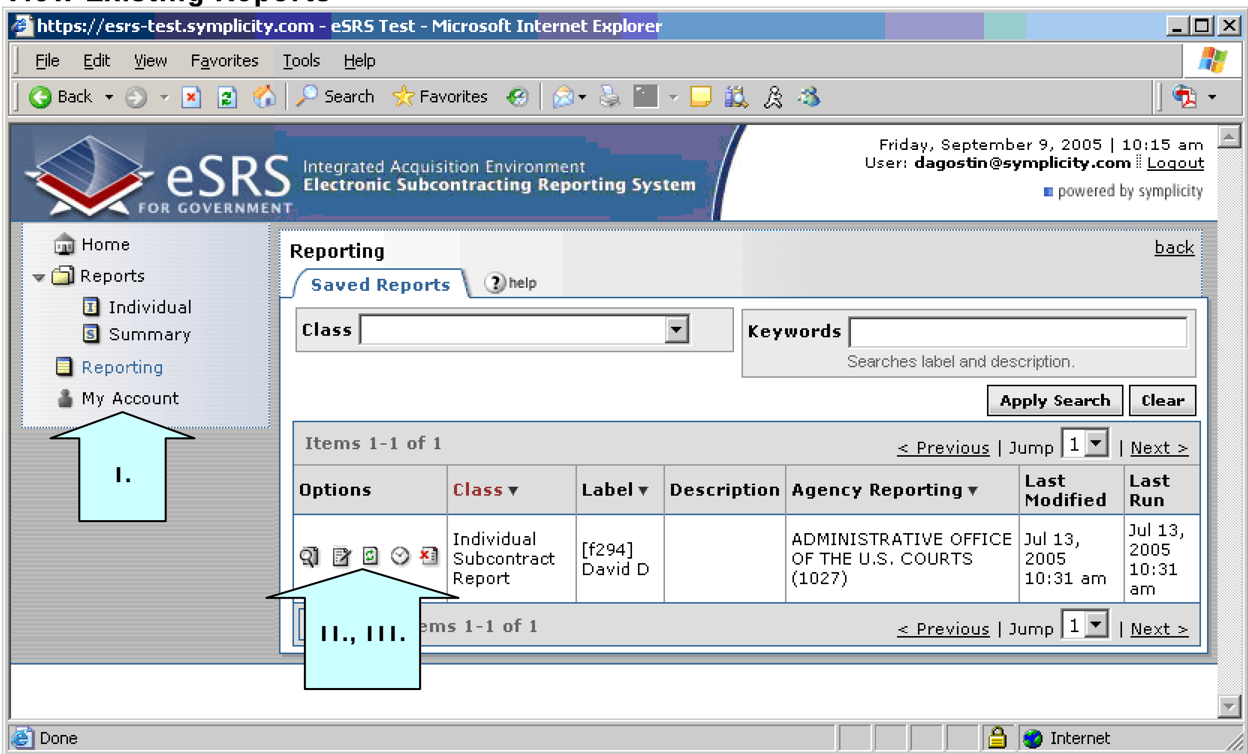
Review Generated Report



5.3 View Existing Reports

I. View Existing Report by clicking on REPORTING on the left navigation menu.
II. View Saved Queries/Report on the list.
III. View , Edit , Re-run , View Previous Results by clicking on respective icons.

View Existing Reports



6. My Account

6.1 General Information

My Account enables users to change their personal information (Name, Title, Phone, Fax, E-mail) and passwords.

I. Under Tools, Click on My Account.
II. Change the fields that you wish to edit.
III. Click on “Save”.

6.1 Change Password

I. Under Tools, Click on My Account.
II. Click on the password tab.
III. Enter your new password.
IV. Click on “Save”.

Password Change Screen